RENFREWSHIRE VALUATION JOINT BOARD

STRATEGIC SERVICE PLAN
APRIL 2024 TO APRIL 2027

Title	Service Plan – April 2024 to April 2027
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Reviewer	Assessor
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Review History

Review No.	Details	Release Date

SERVICE MISSION AND VISION

WHO WE ARE

Renfrewshire Valuation Joint Board is an independent local government body which was established by The Valuation Joint Boards (Scotland) Order 1995

WHAT WE DO

We professionally compile and maintain the Valuation Rolls, Council Tax Valuation Lists and Registers of Electors for the Renfrewshire, East Renfrewshire & Inverclyde Council areas

OUR AIMS

Building on our established professionalism, we aim to provide high quality, effective and responsive services to all of our stakeholders

COMMITMENTS

We are committed to:

- Consulting our stakeholders, and listening and responding to their views.

- Valuing staff and providing them with opportunities to develop and contribute.

- Reacting innovatively to change.

- Encouraging innovation and recognising achievement within the organisation.

- Treating all stakeholders, including staff, in a fair, consistent manner and in accordance with the Boards commitment to diversity, inclusion and promoting equality.

- Striving for continuous improvement in all aspects of service delivery.

- Ensuring that we are accessible and accountable to stakeholders.

- Pro-actively planning workloads and deploying resources efficiently.

- Using language which is easy to understand.

- Treating the information we hold with care and respect.

- Working with our partners in the Scottish Assessors' Association to ensure Scotland-wide consistency of approach to service delivery.

RENFREWSHIRE VALUATION JOINT BOARD

ASSESSOR AND ELECTORAL REGISTRATION OFFICER

SERVICE PLAN APRIL 2024 - APRIL 2027

PART ONE
SERVICE FUNCTION

1.0   INTRODUCTION

Renfrewshire Valuation Joint Board (RVJB) was established as part of the 1996 reorganisation of local government in terms of The Valuation Joint Boards (Scotland) Order 1995 and is vested with the functions of the valuation authorities of Renfrewshire, East Renfrewshire and Inverclyde. With the agreement of the three Councils, the Board also has responsibility for the Electoral Registration function for all 3 areas.

The Assessor is responsible for valuation for non-domestic rating (The Valuation Roll) and council tax banding (The Valuation List), and in his role as Electoral Registration Officer, the compilation of the Electoral Register.

The primary service functions are the compilation and maintenance of the Valuation Roll, the compilation and maintenance of the Valuation (Council Tax) List and the preparation and publication of the Register of Electors.

1.1   VALUATION ROLL

The Valuation Roll is a list of all non-domestic properties, which are not excluded properties, along with the Net Annual and Rateable Values which the Assessor has established for each property. These annual values form the basis for non-domestic rates charges. The Roll is published annually and updated weekly.

The Assessor is now required to complete a 3-yearly Revaluation of all non-domestic properties within the Valuation Roll. The most recent of these was completed in accordance with the statutory timetable and came into effect on 1st April 2023 and the next one is scheduled for 1st April 2026.

The number of properties in the Valuation Rolls for the three council areas varies, as at 31st March 2024, there are around 14,300 with a total Net Annual Value of approximately £380 million.

The Assessor for Renfrewshire is the designated Assessor for fixed line telecommunication subjects throughout Scotland as per the amended Non Domestic Rating (Valuation of Utilities) (Scotland) Order 2005, this has added over £70m to the Renfrewshire Valuation Roll. This is currently resourced from the existing budget allocation.

The Roll is printed annually and updated weekly. The full Valuation Roll incorporating the weekly updates is available to the public through the web site of the Assessors shared service the SAA Portal www.saa.gov.uk

1.2   VALUATION LIST

The Council Tax Valuation List is a list of all domestic properties upon which Council Tax charges are based. It is published annually and updated weekly.

Each dwelling is placed in one of eight broad valuation bands according to its estimated market value as at 1st April 1991.

As at 31st March 2024, there are over 172,000 dwellings in the Valuation Lists for the Joint Board area.

The List is printed annually and updated weekly. The full list incorporating the weekly updates is available to the public through the web site of the Assessors shared service the SAA Portal www.saa.gov.uk

1.3 REGISTER OF ELECTORS

The Register of Electors contains the names of all person's resident within the area and eligible to vote at Parliamentary, Scottish Parliamentary and Local Elections. It is published annually, by the 1st December, and is updated on a monthly basis. The number of electors on the register as at publication on 1st December 2023 was 276,022.

The Revised Register is updated by a canvass of all households, which is carried out during July - November each year (The Canvass Period).

Use of the Electoral Register is controlled by statue. However, an Open Register of Electors, which can be used for any purpose, is also prepared. Electors have the option to opt out of this Open Register.

1.4 OTHER FUNCTIONS

Arising from legislative requirement or commitment to government policy, the Assessor also carries out a range of functions in support of the above primary services. These include the following :-

Corporate Governance-
Procedures and practices have been implemented and are adhered to at member and official level. These will be continually reviewed and improved with particular reference made to such good practice and good governance guidance as is provided by Audit Scotland. Risk Management forms an integral part of the corporate governance framework alongside the Corporate Risk Register (CRR) which is updated twice yearly to reflect current risks and issues

Accountability-
This is achieved through a combination of external audit, internal audit, performance monitoring and reporting.

Best Value -
RVJB recognises its duty, under Section 1 of The Local Government in Scotland Act 2003, to make arrangements to secure Best Value. The Valuation Joint Board is committed to the principles and practices of Best Value and to the integration of this theme into all areas of operation.

Equalities –
In accordance with Equalities Act 2010, RVJB discharges its functions in a manner which encourages equal opportunities and the observance of equal opportunity requirements.

Staff-
RVJB recognises its staff as valuable assets and key stakeholders.

Financial Reporting –
Proper Financial procedures and practices, including annual budgeting, monthly monitoring and public reporting, are in place.

Information Technology –
The services of RVJB will continue to be supported and improved on through the application and development of Information Technology systems in accordance with business need and best practice.

Freedom of Information (FOI) –
In accordance with Section 23 of the Freedom of Information (Scotland) Act, both RVJB and the Assessor maintain a combined Publication Schemes and comply with the requirements of the request for information regime. Further, they recognise and adhere to the Codes of Practice issued under the terms of the Act. The appropriate model publication scheme has been adopted. Section 23 does not apply to the statutory functions of the ERO but the general principles of openness will be reflected in responses to requests for information.

Public Records –
The Public Records (Scotland) Act 2011 requires that listed public authorities submit Records Management Plans to the Keeper for approval and to hold and maintain records in accordance with that plan. The plan for RVJB was submitted and approved by the Keeper in January 2016. RVJB engages with the Keeper's Assessment Team when invited to undertake a Progress Update Review on the approved plan.

RVJB operates in an ever more complex and financially challenging environment and continues to develop a range of key partnerships and stakeholder relationships.

RENFREWSHIRE VALUATION JOINT BOARD

ASSESSOR AND ELECTORAL REGISTRATION OFFICER

SERVICE PLAN APRIL 2024 - APRIL 2027

PART TWO
CORE OBJECTIVES

The criteria for the planning, management, monitoring and reporting of the three main areas of function are included in Part Four, 'Performance Management'.

2.1 THE VALUATION ROLL

2.1.1 Maintenance of the Valuation Roll, including the addition of new subjects and the amendment of existing subjects, will continue, year-on-year, in accordance with RVJB's established procedures for completion within the statutory timescales and annual targets. Valuation Notices will be issued to all Proprietors, Tenants and Occupiers and all relevant changes will be notified to the billing authorities timeously.

2.1.2 The 2023 Revaluation has taken place, it was the first Revaluation to have a two stage Proposal and Appeal process for Proprietors, Tenants and Occupiers who are unhappy with their Revaluation Roll entry. The deadline for submitting Revaluation Proposals was 31st August 2023. We received 964 Proposals, these proposals must have a decision notice issued by 30th September 2025, following the issue of a decision notice the proposer, unless an agreement has been reached, has the right to appeal to the First Tier Tribunal Local Taxation Chamber.

2.1.3 In addition, running roll proposals can be submitted at any time during the life of the Valuation Roll. The Assessor will include such proposals in the ongoing schedule of Proposal Decision Dates in order that they are disposed of in accordance with their varying timetables.

2.1.4 Following the Coronavirus pandemic a significant number of material change of circumstance appeals were lodged, these appeals were transferred to the First Tier Tribunal Local Taxation Chamber (FTT) to schedule the disposal of these. There remain 2,377 of these outstanding as at 31st March 2024 which have a disposal date of 31st December 2024 and the FTT will be scheduling hearing for these.

2.1.5 In support of the proposal and appeals process and in preparation for the 2026 Revaluation, the Assessor's staff will continually ingather and analyse rental (and other) information. Additionally, staff are actively participating in the Working Groups and Committees of the Scottish Assessors' Association to confirm or amend the 'Practice Notes' produced by the SAA.

2.1.6 Factors which are out with the Assessor's control include the scheduling of appeals by the FTT, the Upper Tribunal (UT) and the Lands Valuation Appeal Court.

2.1.7 The Assessor for RVJB is responsible for the maintenance of all fixed line Telecom valuations for all of Scotland. The obligation to deal with these subjects, and their appeals in particular, may place significant additional obligations on the organisation and may also impact on its functions, and structure. There are still a small number of 2005, 2010 and 2017 running roll and Revaluation appeals against the NAV/RVs of these subjects which have been referred to the UT.

2.2 THE VALUATION (Council Tax) LIST

2.2.1 Maintenance of the Valuation List, in particular the addition of new subjects, will continue, year-on-year, in accordance with RVJB's established procedures for completion within annual targets. Banding Notices will be issued to all interested parties and all relevant changes will be notified to the billing authorities timeously.

2.2.2 A relatively small number of proposals against banding continue to be received. Discussions in relation to these are ongoing and where the proposer remains dissatisfied after discussions they are able to make an appeal to the FTT.

2.2.3 There is a possibility that a Council Tax Revaluation may be ordered at any time. Although there is no indication that such a Revaluation will be ordered in the immediate future, a watching brief will be retained and processes and procedure to facilitate such a Revaluation will be initiated as required.

2.3 THE REGISTER OF ELECTORS

2.3.1 The 'Full' Annual and 'Open' Registers will be published by 1st December in each year following a canvass carried out, during July - November. The objective of the canvass will be to ensure, the accuracy of the register and that it is as complete as possible. This process will be supported through a variety of contacts, such as by email, telephone and SMS. Door to Door inquiries will be carried out at houses where no current information is held for the residents and properties where previous contact attempts have failed.

2.3.2 The Register will be updated on a monthly basis by the production of Lists of Additions, Deletions and Alterations. All statutory Notices and Lists will be timeously provided to relevant parties.

2.3.3 Election Registers and Lists of Absent/Postal/Proxy voters etc will be produced as required by statute and by agreement with Returning Officers.

2.3.4 Canvass reform took place in 2020 and the register is data matched against DWP, households that match are sent a communication confirming who the ERO has on the register at that address and inviting them to contact the ERO if there are any changes. Any households who do not match are then run against local data matching sources and if matched then receive a similar communication. Only those households which don't match nationally or locally are then sent a form asking them to confirm or supply the names etc of people resident in that household to allow them to be issued with Invitations to Register (ITR's).

2.3.5 Following the devolution of powers for Scottish Parliamentary and Local Government Elections to the Scottish Government, ERO's are required to compile a register which includes 14 year olds, this is to facilitate preparing a register for either of the aforementioned elections in Scotland which will contain young persons who are aged 16 on the date of the election.

2.3.6 The Scottish Government also introduced new legislation to allow anyone who is resident in Scotland to be added to the register for Scottish Parliamentary and Local Government elections, in the main these are qualifying foreign nationals who can now be added to these Scottish franchised elections.

2.3.7 Similarly, the Scottish Government introduced legislation which allows prisoners serving less than a 12 month sentence to register for these Scottish elections.

2.3.8 During early 2024 the Scottish Government Introduced the Scottish Elections (Representation and Reform) Bill to the Scottish Parliament and it is likely that this Bill will complete its Parliamentary process during the lifetime of this plan. The ERO will engage with the Government and other stakeholders on any actions that are required if the Bill becomes law and will take part in any consultations through the Scottish Assessors Association.

2.3.9 The Election Act 2022 introduced a number of changes to the duties of EROs regarding electors that qualify for the UK Parliamentary Franchise. The introduction of Voter Authority Certificates, the changes to the franchise rules for Overseas electors and changes to the application process and rules for absent votes have all been introduced at various times since 2023 and their implementation will continue throughout the lifetime of this plan.

2.3.10 Continuity, sharing of best practice can all take place through the Assessor's Association, Electoral Registration Committee. We will continue to work with the Electoral Commission and the Association of Electoral Administrators (AEA), to assist with formalising of policies or changes to Electoral Registration Legislation.

2.3.10   Following the creation of the Electoral Management Board for Scotland (EMB) the ERO is subject to directions issued by the Convenor to this Board in respect of local government elections in Scotland and any future Scottish referendums. The Boards ERO is also vice chair of the Scottish Assessors Association Electoral Registration Committee.

2.4   CORPORATE GOVERNANCE

2.4.1   RVJB will ensure that the Assessor and Electoral Registration Officer is adequately resourced to perform his statutory functions. It will meet to discuss and approve Budgets, Policies and Practices as is deemed necessary and the members will act in accordance with the Code of Conduct for Councillors, which is approved by the Scottish Government.

2.4.2   The officers of RVJB will act in accordance with the relevant Schemes of Delegation, Financial Regulations, Standing Orders and Codes of Conduct. These will be reviewed on a regular basis and as required.

2.4.3   Strategic and detailed Annual Service Plans will be implemented, maintained and actioned. The Strategic Plan will cover a three year period, whilst noting matters of relevance beyond that timescale. Annual Service Plans will be reviewed prior to annual budget planning.

2.4.4   Policies covering Defalcation Procedures and Fraud Prevention have been implemented and will be reviewed on a three-yearly basis

2.4.5   The Management Team will continue to be the primary forum for the development and implementation of Strategy and Policy and will oversee all operational matters. Actions will be communicated to staff by means of team briefings and written bullet points.

2.4.6   Effective performance management systems continue to be developed, with the Management Team also forming the principal forum for matters relating to Performance Management, Planning and Reporting. A Reporting Framework has been implemented and is subject to continual review.

2.4.7   Specific operational matters will be within the remit of the various internal Forums and Working Groups who will report to the Management Team. The format, remit and membership of these groups will be reviewed on a regular basis.

2.4.8   RVJB will continue to align its Personnel and other related policies, where appropriate, with those of Renfrewshire Council.

2.4.9   The finances and operations of RVJB will be subject to internal and external audit (see 2.5).

2.4.10   A Corporate Risk Register is maintained and reviewed regularly by the Assessor and the Management Team and is presented bi-annually to the RVJB.

2.5   ACCOUNTABILITY

2.5.1   Annual Accounts will be submitted for external audit. They will be published in accordance with the requirements of Audit Scotland and RVJB's Publication Scheme.

2.5.2   The procedures and practices of RVJB will also be subject to external audit, in accordance with a timetable to be directed by Audit Scotland.

2.5.3   An audit plan encompassing the requirements of the external and internal auditors will be drawn up annually.

2.5.4   Performance will be monitored and reported internally and externally. A Reporting Framework of annual, quarterly, monthly, statutory, KPI and internal management reports has been developed. This Framework will, in response to changing external requirements and management need, be subject to continuous review.

2.5.5   Decisions of the Management Team, Forums and the Working Groups will be minuted and available for inspection.

2.6   BEST VALUE

2.6.1   Best Value is statutorily defined as 'continuous improvement in the authority's performance'. RVJB is committed to the principle of Continuous Improvement. In support of this Performance will be planned and monitored (see 2.5.4 above). Key Performance Indicators have been implemented in conjunction with the Scottish Government and the Scottish Assessors' Association and reported to the Scottish Government and other key stakeholders annually. The range of Key Performance Indicators will be further developed in association with the above bodies.

2.6.2   Performance Indicators have also been developed for Electoral Registration and will continue to be developed on an ongoing basis by the Management Team.

2.6.3   Performance Indicators will be used for year-on-year comparisons.

2.6.4   In accordance with Section 13 of The Local Government in Scotland Act 2003, the performance of RVJB in relation to its functions will be reported to stakeholders of the Valuation Joint Board, including staff, in the most appropriate manner.

2.6.5   RVJB's in-house Forums will continue to be used and developed for reviewing performance and developing and implementing best practice.

2.6.6   Listening to and working with our Stakeholders will be an ongoing process and any outcomes considered in the Service Planning.

2.6.7   There is a Customer Comments and Complaints procedure in place in line with the Scottish Public Sector Ombudsman's (SPSO) Model Complaint Handling Procedure.   All comment/complaints will be considered by the Management Team for improvement action and reported as required by the procedure.

2.6.9   RVJB will give consideration to any guidance issued under the terms of Section 2(1)(b) of The Local Government in Scotland Act (2003). This is an external factor over which RVJB has no control and which may result in variations to the Service Plan.

2.7   EQUALITIES

2.7.1   RVJB is committed to equality in respect of all protected characteristics.

A report on Equalities Outcomes is produced biennially in line with RVJB's duties under Equalities legislation.

2.7.2   Refresher training on Equalities is mandatory for all staff every two years.

2.7.3   All policies will be continuously reviewed to encompass equalities issues.

2.7.4   As policies are implemented or amended, staff will be adequately trained.

2.8   STAFFING AND PERSONNEL MATTERS

2.8.1   RVJB will continue to align its Personnel and other related policies, generally, with those of Renfrewshire Council where possible. Should it be necessary to produce a policy relevant to the Assessor & ERO these will be written and published on both the RVJB's Document Management System (DMS) and the website along with all other relevant policies.

2.8.2   A Training Plan which aims to ensure that adequate training is provided to all members of staff, has been developed. Staff will be able to review their training needs with their managers on an annual basis. There is a dedicated Training Team which reviews training needs for all employees and meets regularly.

2.8.3   To ensure that RVJB's personnel policies and procedures are kept up to date, regular contact will be maintained with Renfrewshire Council.

2.8.4   In line with RVJB's Health and Safety Policy, Risk assessments covering all areas of function are reviewed annually. A Union representative is part of the Board's internal Health & Safety team which meets regularly to inspect the building and discuss any issues or concerns.

2.9   FINANCE AND BUDGETING

2.9.1   The officers of RVJB will act in accordance with the relevant Financial Regulations and Standing Orders, which will be reviewed on a five-yearly basis or as circumstances demand.

2.9.2   In partnership with the Finance Resources of Renfrewshire Council, budgets will be prepared annually and approved by RVJB. A detailed report on the makeup of the budget will also be prepared annually.

2.9.3   Appropriate procedures for procurement, authorisation and payment have been implemented and these will be subject to regular review.

2.9.4   RVJB will, where appropriate, utilise software and processes adopted by Renfrewshire Council to process invoices, payments and receipts.

2.9.5   Financial monitoring reports are received from Renfrewshire Council and verified on a monthly basis. These are used to prepare reports detailing under and overspends, along with corrective actions, to Management Meetings on a monthly basis and RVJB as required.

2.9.6   Year-end Accounts will continue to be prepared, audited and made available for public inspection.

2.9.7   Payroll checks will be formalised, in accordance with the Reporting Strategy, and reports presented regularly to the Management Team.

2.9.8   The current UK and Scottish Government Policies in relation to reducing Public Sector expenditure are likely to establish the context for many of the operational decisions and changes which require to be made in the foreseeable future.

2.10 INFORMATION TECHNOLOGY

2.10.1 The provision and maintenance of Information Technology assets, systems and services are carried out in accordance with RVJB's Information Technology Strategy. As and when required IT Liaison meetings are held with Renfrewshire Council IT personnel to discuss any issues where RVJB and Renfrewshire Council share IT services.

2.10.2 The assets of RVJB will be refreshed in accordance with good practice.

2.10.3 RVJB adheres to the principles of Data Protection and has registered with the ICO as the Assessor, ERO and the Joint Board.

2.10.4 The Assessor's 'Progress' information technology system has reached its end of life and a new IT system has been procured and will be implemented at a time suitable for service delivery.

2.10.5 A third party supplier provides the Electoral Registration system, used by the ERO. This has had several updates and upgrades during 2023 and 2024 to ensure it continues to be fit for purpose in light of the changes introduced by the Elections Act 2020. Ensuring the system is compliant with current legislation is vital to the integrity of the register.

2.10.6 RVJB uses a Document Management System which helps to fulfil our obligations under the Public Records (Scotland) Act 2011.

2.10.7 RVJB will continue to commit resources to the Scottish Assessors Portal project.

2.10.8 The form and content of the RVJB Web Site will be reviewed on an on-going basis.

2.10.9 A Disaster Recovery solution is in place, this allows RVJB to connect to servers and software located off-site and provides resilience should the IT system at the Robertson Centre become compromised or inaccessible.

2.11 INFORMATION MANAGEMENT

2.11.1 A Freedom of Information Policy Statement has been approved by RVJB and this will be reviewed regularly.

2.11.2 A Model Publication Scheme has been compiled for both the Assessor and RVJB and will be reviewed when appropriate, to include information requests that result in repeated provision of information.

2.11.3 Procedures to enable compliance with the requirements of the Freedom of Information (Scotland) Act 2002 have been implemented. These will be reviewed regularly.

2.11.4 Systems to deal with Freedom of Information requests have been developed and implemented and these will be reviewed in light of the demands of the request regime. A Freedom of Information Log is maintained.

2.11.5 RVJB recognises the importance of Codes of Practice issued under the terms of the Freedom of Information (Scotland) Act and will review practices and procedures on publication of any of such guidance.

2.11.6 The Data Protection Act 2018 is in force. We have, in conjunction with the Scottish Assessors Association's Governance Committee, adopted Privacy Notices, Policies/Procedures and training to ensure the Assessor, the ERO and the Joint Board are compliant with data protection legislation.

2.11.7 Under data protection legislation it is mandatory for a public authority to appoint a Data Protection Officer (DPO) who is authorised to discharge this role, which includes autonomy in advising on all issues which involve the protection of personal data and monitoring compliance. To ensure RVJB meets all its obligations the board employs a DPO with considerable experience on a part time basis along with having two members of the Senior management team having undertaken bespoke training on DPO legislation and duties.

2.11.8 The Assessor, The ERO and the Joint Board are Data Controllers in terms of Data Protection Legislation and maintains registration as such.

2.11.9 As Data Controllers, we will manage all personal data held in compliance with the 6 Data Protection Principles. Processes for handling information will be regularly reviewed to ensure continued compliance and the DPO will be consulted on any new and existing processes to ensure our compliance.

2.12   KEY PARTNERSHIPS

2.12.3 The support services provided by Renfrewshire Council are essential to the operations of RVJB. These services will continue to be managed by regular contact with relevant persons in each of the supporting Resources and by agreement of Service Level Agreements.

2.12.4 Being the primary recipients of operational outputs (Valuation Rolls, Councils Tax Valuation Lists and Electoral Registers), RVJB recognises its constituent Councils as key stakeholders, and will consult with these bodies in all areas relating to these matters.

2.12.5 RVJB recognises the important relationship it has with the Returning Officers of the 3 constituent authorities and will continue regular liaison with them. This will include the organisation and hosting of our Joint ERO/RO Meetings.

2.12.6 RVJB will continue to commit resources to the workings of the Scottish Assessors Association (SAA). In this respect, it will participate in Plenary, Committee and Working Group meetings and fully engage in the exchange of information, ideas and knowledge provided by this Association.

2.12.7 Through the SAA, the Assessor for RVJB will maintain liaison with bodies such as the Scottish Government, Scotland Office, Valuation Office Agency (England and Wales), the Valuation and Land Agency (Northern Ireland), Tailte Eireann (Ireland) and The Royal Institution of Chartered Surveyors.

2.12.8 Similarly, RVJB staff will continue to participate in the workings and proceedings of the Association of Electoral Administrators the Institute of Revenues, Rating and Valuation (IRRV) and the Royal Institution of Chartered Surveyors (RICS).

2.12.9 RVJB recognises the role of, and support provided by, The Electoral Commission and the Electoral Management Board for Scotland in respect of Electoral Registration matters.

2.12.10 Staff are recognised as both key assets of RVJB and primary stakeholders, and consultations with both staff and their representatives will continue on a regular basis.

2.12.11 Relationships with external suppliers of systems and services are subject to contract and/or Service Level Agreement and are managed through liaison with the relevant account manager or similar representative. Such services are, however, subject to continuous review regarding effectiveness, quality and price.

2.13   MISCELLANEOUS

2.13.1   The Public Records (Scotland) Act 2011 required that listed public authorities submit Records Management Plans to the Keeper for approval and to hold and maintain records in accordance with the plan. The RVJB plan was approved by the keeper in 2016 and RVJB engages with the Keeper's Assessment Team when invited to undertake a Progress Update Review on the approved plan. A Records Management Plan has been developed and approved by the Keeper and is kept under constant review.

2.13.2   RVJB is committed to various initiatives, not covered above but which have significant implications for Service Planning, priorities and actions. These tend to be of an ad-hoc nature and demand variable commitment.

2.13.3   The Assessor for RVJB will respond, either directly or through the relevant associations, to pertinent legislative, and other, consultations.

2.13.4   Any future local authority boundary or electoral constituency changes will require resource allocation and planning.

2.13.5   RVJB is committed to the development and implementation of the Corporate Address Gazetteers of its constituent Councils (and through these initiatives to the formation of a National Gazetteer) and use of National Unique Property Reference Numbers. To that end it will provide such assistance, information and data as it reasonably can and participate in such joint projects as it can meaningfully contribute to.

2.13.6   The landlords of our offices have intimated that they will not extend the lease beyond 31st March 2025. Identification of and securing suitable accommodation as well as the planning and execution of a move to new premises will be a prominent task during the first year of the lifetime of this plan.

RENFREWSHIRE VALUATION JOINT BOARD

ASSESSOR AND ELECTORAL REGISTRATION OFFICER

SERVICE PLAN APRIL 2024- APRIL 2027

PART THREE
KEY ACTIVITIES AND OUTCOMES

Key To Business Objectives

The codes in the table below relate each Activity and Outcome contained in Part Three of the Service Plan to the relevant Business Objective(s) within RVJB's **Mission, Vision and Commitments** Statements.

Number	Business Objective
1	Compile the Valuation Roll
2	Compile the Council Tax Valuation List
3	Compile the Electoral Register
4	Maintain the Valuation Roll
5	Maintain the Council Tax Valuation List
6	Maintain the Electoral Register
	All of the above are underpinned by the aim of providing these services in a high quality, effective and responsive manner.
7	Listening and responding to Stakeholders needs
8	Valuing staff and providing them with opportunities to develop and contribute
9	Reacting innovatively to change
10	Treating all stakeholders, including staff, in a fair, consistent manner and in accordance with the Boards commitment to diversity, inclusion and promoting equality.
11	Striving for continuous improvement in all aspects of service delivery
12	Ensuring that we are accessible and accountable to stakeholders
13	Pro-actively planning workloads and deploying resources
14	Using 'plain English'

3.1 THE VALUATION ROLL

3.1.1 Maintenance of the 2023 Valuation Roll

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Record all known development activities, including planning permissions and building control warrants granted, in accordance with the RVJB Guidance Instructions and within the agreed timescales.	1,4,10,11	Principal Valuers /Data Manager	On receipt in accordance with schedules
(b)	Survey of all new, amended or demolished non-domestic properties in accordance with RVJB Survey Guidance.	1,4,10,11	Principal Valuers	Continual basis
(c)	Valuation of above in accordance with the SAA approved Practice Notes, in-house Practice Notes and with reference to relevant 'Narratives".	1,4,10,11	Principal Valuers	Continual basis
(d)	Amend the Valuation Roll by input to the Assessors 'Live' computer system.	1,4,10,11	Data Manager	Continual basis
(e)	Check and authorise all such amendments in accordance with RVJB procedures, making changes or referring back as appropriate.	1,4,10,11	Divisional Assessors Data Manager	Weekly
(f)	Transfer all changes to relevant billing authorities in accordance with annually agreed schedules.	1,4,10,11	Data Manager	Weekly
(g)	Issue Valuation Notices to all interested parties as required by statute.	1,4,10,11,12,14	Data Manager	Weekly
(h)	Update data at SAA Portal in accordance with agreed schedules	7,9,11,12	Data Manager/IT Manager	Weekly
(i)	Complete the above in accordance within the annually reviewed targets relating to Key Performance Indicators	11,13	All staff	Continual basis
(j)	Compile and present Running Roll statistics to Management Team	4,11,13	Data Manager	Monthly
(k)	Issue Assessors Information Notices (AIN's) requesting information on ownership, tenancy and occupation of the property along with information relating to physical alterations and rental details. Electronic returns and bulk upload facility available	4,10,12,14	Divisional Assessors	Continual basis
(l)	Issue Civil Penalties as required following non return of AIN. Working with RC Finance Dept to issue notices and collect penalties.	1,4, 10,11	Divisional Assessors/Assistant Assessor	Continual basis
(m)	Reporting to the SG of the number of fines issued; collection and return, any net sums collected to the Scottish Consolidated Fund held by the SG.	4,9,10,13	Divisional Assessors/Assistant Assessor	As requested
(n)	Answer all ad-hoc enquiries from current, past and potential ratepayers in accordance with RVJB Working Practices.	4,7,10,12,14	All staff	Continual basis
(o)	Ingather information for Telecoms	4, 10,13,14	Data Manager	Various schedules
(p)	Update records for Fixed Line Telecoms as designated Assessor	1,4, 10,11	Assistant Assessor/ Divisional Assessor	Continual basis
(q)	Partnership working with VOA on UK valuations for fixed line telecoms	1,4, 10,11	Assessor/ Assistant Assessor/ Divisional Assessor	Continual basis
(r)	Complete year-end procedures for creation of refreshed Valuation Roll in accordance with Year-End Timetable	1,4,	Data Manager	Annually, March

3.1.2 Revaluation 2023 - Settlement of Proposals and Appeals

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Maintain records of Proposals and appeals including their status in relation to Proposal Decision Dates, hearings dates at FTT and UT	1,4,10,13	Divisional Assessors	Continuous
(b)	Negotiate and settle proposals with ratepayers and their agents in accordance with statutory timetables and with recourse, where necessary, to the FTT and UT.	1,4,10,11,12	Divisional Assessors	Continuous
(c)	Issue Proposal Decision Dates to all outstanding Revaluation Appeals, at least in accordance with the statutory timetable of decision notice being issued prior to the end of September 2025.	1,4,10,11,12	Divisional Assessors	As scheduled
(d)	Prepare FTT and UT cases including rental analysis, valuations, photographs, plans and other productions	1,4,10,11,12,14	Divisional Assessors/ Assistant Assessor/Assessor	As required
(e)	Provide SAA with information as required to support FTT and UT preparation & Hearings	1,4,10,12,14	Assessor, Assistant Assessor / Divisional Assessors	As required
(f)	Where appropriate, amend the Valuation Roll to reflect proposal decision notices and appeal decisions in accordance with procedures as above	1,4,10,11,12	Divisional Assessors /Data Manager	Continuous
(g)	Check and authorise all such amendments in accordance with RVJB procedures, making changes or referring back as appropriate.	1,4,10,11,12	Divisional Assessors /Data Manager	Weekly
(h)	Where appropriate, issue Valuation Notices to reflect proposal decision notices and appeal decisions.	1,4,10,11,12,14	Data Manager	Weekly
(i)	Compile and present Revaluation Appeal statistics to Management Team and Scottish Government.	11	Divisional Assessors & Data Manager	As required

3.1.3 Running Roll Proposals and Appeals

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Record proposals and appeals received arising from amendments made to the 2023 Valuation Roll.	4,10,13	Divisional Assessors Data Manager	Continuous
(b)	Implement and maintain procedures to process proposals received via SAA Web Portal	4,7,9,10,11,12,14	Divisional Assessors Data Manager	Continuous
(c)	Maintain records of Proposals and appeals including their status in relation to Proposal Decision Dates, hearings dates at FTT and UT	4,10,13	Divisional Assessors Data Manager	Continuous
(d)	Issue Proposal Decision Dates to all outstanding Revaluation Appeals, at least in accordance with the statutory timetable of decision notice being issued. In addition negotiate and settle any outstanding 2005, 2010 and 2017 appeals at the FTT or UT.	4,10,11,12	Divisional Assessors /Assistant Assessor/ Assessor	Continuous
(e)	Issue Proposal Decision Dates for all outstanding Running Roll Appeals in accordance with the statutory timetable appropriate to each appeal.	4,10,11,12	Divisional Assessors	As scheduled
(f)	Prepare FTT and UT cases including rental analysis, valuations, photographs, plans and other productions	4,10,11,12	Divisional Assessors	As required
(g)	Where appropriate, issue Valuation Notices to reflect proposal decision notices and appeal decisions.	4,10,11,12	All appropriate valuation staff/Data Manager	Continuous
(h)	Check and authorise all such amendments in accordance with RVJB procedures, making changes or referring back as appropriate.	4,10,11,12	Divisional Assessors /Data Manager	Weekly
(i)	Where appropriate, issue Valuation Notices to reflect proposal decision notices and appeal decisions.	4,10,11,12,14	Data Manager	Weekly
(j)	Compile and present Running Roll Appeal statistics to Management Team.	11	Divisional Assessors	Monthly

3.1.4 Revaluation 2026 (to include Telecoms as designated assessor)

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Issue Assessor's Information Notices (AIN's)	1,4,7,10,11,12,13,14	Divisional Assessors & Data Manager	As required
(b)	Manage returns of above in accordance with the RVJB procedures/clerical Instructions.	1,4,7,10,11,12,13,14	Data Manager	On return
(c)	Manage issuing of Civil Penalties for Non Return of information	1,4,7,10,11,12,13,14	Data Manager	As required
(d)	Inform RC of any non returns to allow pursuit of fees (per agreed protocol)	1,4,7,10,11,12,13,14	Data Manager	As required
(e)	Analyse VORC returns and Bulk Upload returns to Portal	1,4,7,10,11,12,13,14	Divisional Assessors/All staff	As required
(f)	Analyse rentals of 'bulk class' subjects as agreed within established Working Groups and in accordance with SAA rental analysis guidance. Facilitate same, using Valuation System	1,4,10,11,12,13	Divisional Assessors	As required
(g)	Analyse local land sale information for use in contractor's valuations.	1,4,10,11,12,13	Divisional Assessors	As required
(h)	Draft Narratives and rates to be applied in valuations, where appropriate.	1,4,10,11,12,13,14	Divisional Assessors	As required
(i)	Approve Narratives and rates to be applied in valuations, where appropriate	1,4,10,11,12,13,14	Assessor / Assistant Assessor/Divisional Assessors	As required
(j)	Provide information as required to SAA Practice Note authors, working groups and Category Committees.	1,4,10,11,12,13	All Staff	As required
(k)	Draft and present SAA Practice Notes for approval by Committees	1,4,10,11,12,13	SAA members	As required
(l)	Make comment on and provide input to draft/proposed Practice Notes.	1,4,10,11,12,13,14	Assistant Assessor/Divisional Assessors	As required
(m)	Adopt and issue amended practice notes for use within RVJB (Make available through SAA on Web Portal)	1,4,7,10,11,12,13,14	Assistant Assessor/Divisional Assessors	As required
(n)	Value subjects for Revaluation purposes in accordance with local schemes of valuation, SAA Practice Notes and RVJB targets for completion.	1,10,11,12,13	Divisional Assessors	As required
(o)	Authorise proposed Rateable Values (RVs)	1,10,11,12,13	Assistant Assessor/Divisional Assessors/Principal Valuers	As required
(p)	Ensure proposed NAVs/ RVs shown correctly on Valuation System	1,10,11,12,13	Data Manager	As required
(q)	Check and authorise all such amendments in accordance with RVJB procedures, making changes or referring back as appropriate.	1,4,10,11, 12, 13	Data Manager	Weekly
(r)	Export proposed NAVs/RVs (including summary valuation data where appropriate) to Assessors portal via Valuation System	1,4,10,11	Data Manager/IT Team	Weekly

3.2 THE COUNCIL TAX VALUATION LIST

3.2.1 Maintenance of the Council Tax Lists

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Record all known development activities, including planning permissions and building control warrants granted, in accordance with RVJB Guidance/Instructions and within the agreed timescales.	2,5,10,11	Principal Valuers/Data Manager	On receipt in accordance with schedules
(b)	Survey of all new or demolished domestic properties in accordance with RVJB Survey Guidance.	2,5,10,11	Principal Valuers	Continuous
(c)	Valuation and banding of above in accordance with the statutory valuation assumptions and RVJB procedures.	2,5,10,11	Principal Valuers,	Continuous
(d)	Amend the Valuation List by input to the Assessors 'Live' computer system.	2,5,10,11	Principal Valuers/Data Manager	Continuous
(e)	Check and authorise all such amendments in accordance with RVJB procedures, making changes or referring back as appropriate.	2,5,10,11	Principal Valuers/Data Manager	Weekly
(f)	Transfer all changes to relevant billing authorities in accordance with annually agreed schedules.	2,5,7,10,11	Data Manager	Weekly
(g)	Issue Banding Notices to all interested parties as required by statute.	2,5,10,11,12,14	Data Manager	Weekly
(h)	Complete the above in accordance within the annually reviewed targets relating to Key Performance Indicators.	11	All staff	Continuous
(i)	Compile and present Council Tax change statistics to Management Team in accordance with Reporting Framework	11	Divisional Assessors	Monthly
(j)	Update data at SAA Portal in accordance with agreed schedules	5,7,9,10,11,12,14	Data Manager & IT Manager	Weekly
(k)	Answer all ad-hoc enquiries from current, past and potential council taxpayers in accordance with the RVJB Working Practices.	5,7,10,12,14	All staff	Continuous
(l)	Complete year-end procedures for creation of refreshed Council Tax Lists and distribute in accordance with annually prepared Year-End Timetables	5,7,10,11,	Data Manager	Annually, April

3.2.2 Amendments to Bands following Alteration and Subsequent Sale

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Receive and record all the sales of all domestic properties in Renfrewshire, East Renfrewshire and Inverclyde and check for matches with development records.	2,5,10,11,12	Principal Valuers/ Clerical Manager/IT Manager	On receipt of notification
(b)	Where appropriate, survey amended properties.	2,5,10,11,12	Principal Valuers	Ongoing
(c)	Value and band the above in accordance with the statutory valuation assumptions and RVJB procedures.	2,5,10,11,12	Principal Valuers	Ongoing
(d)	Amend the Valuation List by input to the Assessors 'Live' computer system.	2,5,10,11,12	Principal Valuers/Data Manager	Ongoing
(e)	Check and authorise all such amendments in accordance with RVJB procedures, making changes or referring back as appropriate.	2,5,10,11,12	Principal Valuers/Data Manager	Weekly
(f)	Transfer all changes to relevant billing authorities in accordance with annually agreed schedules.	2,5,7,10,11,12	Data Manager	Weekly
(g)	Issue Banding Notices and covering letters to all interested parties as required by statute.	2,5,10,11,12,14	Data Manager	Weekly
(h)	Complete the above in accordance within the annually reviewed targets relating to Performance Indicators.	11	All staff	Continuous

3.2.3 Proposals and Appeals

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Record proposals received in respect of entries in the Council Tax List , including those received via the SAA web portal and monitor their status through appeals to FTT or UT	5,10,11,12	Principal Valuers/Data Manager	On receipt Ongoing
(b)	Negotiate and settle proposals/appeals with council taxpayers and their agents, including defence, where appropriate, FTT or UT.	5,10,11,12	Principal Valuers / Divisional Assessors	Ongoing
(d)	Prepare FTT cases including sales analysis, valuations, photographs, plans and other productions	5,10,11,12	Principal Valuers	As required
(e)	Where appropriate, amend the Valuation List to reflect proposal and appeal settlements.	5,10,11,12	Principal Valuers/Data Manager	Ongoing
(f)	Where appropriate, issue Banding Notices to reflect settlement of proposals and appeals.	5,10,11,12,14	Data Manager	Weekly
(g)	All of the above to be completed in accordance with the RVJB procedures	5,11	Principal Valuers/Data Manager	Continuous
(h)	Compile and present Council Tax Proposals and Appeal statistics to Management Team in accordance with Reporting Framework	11,	Divisional Assessors	Monthly

3.2.4 Council Tax Revaluation

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Restructure Council Tax data on valuation system. Survey current altered domestic properties, including any back logs	1, 10, 11	Divisional Assessors/ Principal Valuers	Ongoing
(b)	Amend valuations and, where appropriate, create 'potential' bands for amended subjects within the Assessor's 'Live' system.	1,5,10,11,13	Divisional Assessors/ Principal Valuers	Ongoing
(c)	Integrate this process into regular recurring maintenance cycles.	1,5,10,11,13	Divisional Assessors/ Principal Valuers	Ongoing
(d)	Survey all properties with sales records around the 'Valuation Date'	1,10,11,13	Divisional Assessors/ Principal Valuers	On announcement of Valuation Date

3.3 THE ELECTORAL REGISTER

3.3.1 Annual Register of Electors

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review canvass procedures, including telephone, Internet /SMS facility and door to door enquiries	3,7,9,10,11,12,13	Assistant Assessor/ Senior Clerical Manager	Annually, May
(b)	Prepare file of properties to be canvassed.	3,9	Senior Clerical Manager	Annually, As Required
(c)	Invite tenders for printing and issuing canvass forms	3,9,10,11,12,13,14	Assistant Assessor	As Required - on expiration of current contract
(d)	Award contract for above	3,9,10,11,12,13,14	Assessor/Assistant Assessor	As Required- on expiration of contract
(e)	Consider requirement to recruit door-to-door canvassers and where needed recruit and order resources	3,8,9,10,13	Senior Clerical Manager / Admin Support	Annually, March - June
(f)	Train door-to-door canvassers and provide resources	3,8,10,11,13	Senior Clerical Manager	Annually, October
(g)	Obtain potential 'attainer' information from education authorities as appropriate.	3,10,11,12,13	Senior Clerical Manager	Annually- pre canvass start date
(h)	Issue of canvass communications, ITR's and, where appropriate, reminders to all households in accordance with annually established timetables.	3,9,10,11,12,13,14	Senior Clerical Manager	Annually, July – October
(i)	Complete such door-to-door canvass in accordance with annually established timetables	3,7,9,10,11,13	Senior Clerical Manager	Annually, July – October
(J)	Complete canvass of establishments	3,9,10,11,13	Senior Clerical Manager	Annually, January – February
(k)	Load scanned images into EMS	3,9,10,11,13	Senior Clerical Manager/ Clerical Team	Annually, July – November
(l)	Receive returns electronically from telephone, internet and SMS direct into EMS	3,7,9,10,11,13	Senior Clerical Manager/ Clerical Team	Annually, July - November
(m)	Process changes on EMS	3,9,10,11,13	Clerical Team	Annually, July - November
(n)	Provide Management Team with canvass progress reports, including telephone and internet service returns	3,9,11	Senior Clerical Manager	Weekly during canvass
(o)	Produce and publish 'Full' and 'Open' Registers, in accordance with statutory timetables, for provision to permitted recipients.	3,7,9,10,12,14	Senior Clerical Manager	Annually, by 1st December
(p)	Issue new Anonymous Elector Documents to Anonymous electors with new elector number	3,7,9,10,12,	Senior Clerical Manager	After publication
(q)	Timeous provision of Registers to appropriate bodies and places, including places of public display, in accordance with statute and EC Performance requirements	3,7,9,10,12,14	Senior Clerical Manager	Annually, December – Jan
(r)	Answer all ad-hoc enquiries from current, past and potential electors in accordance with RVJB Working Practices.	3,7,10,12,14	All relevant staff	Continuous
(s)	Maintain a record of sale and supply of registers	7,10,12	Senior Clerical Manager	Continuous

Item	Description	Objective(s)	Ownership	Date/Recurrence
(t)	Production of Electoral statistics to ROS and Electoral Commission in line with statutory requirement	7,11	Senior Clerical Manager/ IT Manager	Annually, December – Jan

3.3.2 Maintenance of Register of Electors (Rolling Registration)

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Interrogate various data sources including Registers of Scotland, Council Tax systems, Housing records etc, to identify potential change	6, 7,10,11,12,13,14	Senior Clerical Manager	As required
(b)	Issue BAU - ITRs and Canvass Forms, 'Application to Vote by Post' and 'Review' forms/letters timeously to all parties requesting such, and as required from checks of change information received from council and other sources. Issue renewal notices to special category electors (overseas/service voters etc)	6, 7,10,11,12,13,14	Senior Clerical Manager	As required
(c)	Forms received in the post are scanned into EMS	3,9,10,11,13	Senior Clerical Manager	December - June
(d)	Issue Reminders to non-responses when required from the above	6, 7,10,11,12,13,14	Senior Clerical Manager	As required
(e)	Arrange for door-to-door canvass for BAU non-responses to (d) above	6, 7,10,11,12,13,14	Senior Clerical Manager	As required
(f)	Record returns of these and receive applications via Government Digital Service	6, 7,10,11,12,13	Senior Clerical Manager	As required
(g)	Maintain a list of Applications.	6, 10,12,13	Senior Clerical Manager	As required
(h)	With reference to the Integrity Checking staff guidance notes, process 'determined' changes via EMS as above.	6,10,12	Senior Clerical Manager	Monthly, Jan – Sept. As per timetable
(i)	Issue, receive returns and process all Absent Voter Forms- quality of Signature and Date of Birth data checked	6,7,10,12,14	Senior Clerical Manager	As required
(j)	Check all changes to source document.	6,10,12,13	Senior Clerical Manager	Monthly, Jan – Sept. As per timetable
(k)	Timeous production of monthly 'Lists of Alterations' and 'Notices of Alteration' to the Register of Electors and republish the new Open Register.	6,10,11,12,14	Senior Clerical Manager	Monthly, Jan – Sept. As per timetable
(l)	Timeous supply of changes to appropriate persons and bodies in format of choice.	7,9,10,11,12,14	Senior Clerical Manager	Monthly, Jan – Sept. As per timetable
(m)	Compile and present monthly update statistics to Management Team	11,13	Senior Clerical Manager	Monthly
(n)	Answer all ad-hoc enquiries for supply of Electoral Registers	7,9,10,11,12,14	Senior Clerical Manager	As requested
(o)	Answer all ad-hoc queries in line with RVJB working practices	7,9,10,11,12,14	All relevant staff	Continuous
(p)	Review non-returns of forms against Council's Council Taxpayer records to assist with issuing of Canvass Forms	6,9,10,11,12,13	Senior Clerical Manager	All year round
(q)	Triennial enquiry to proxy voters in line with statutory regulations	6,10,11,12,13	Senior Clerical Manager	Annually, April – Aug
(r)	Liaise with Establishments etc regarding new residents' applications to register and absent vote applications.	6,7,10,11,12,13	Senior Clerical Manager	Regularly
(s)	Issue and process Absent Voter forms, including signature waiver requests, in accordance with staff guidance and above timetables. (See 3.3.5 below)	3,6,7,9,10,11,12	Senior Clerical Manager	Ongoing

Item	Description	Objective(s)	Ownership	Date/Recurrence
(t)	Review Participation Strategy/Activities as shown in EC Planning documentation	3,6,7,9,10,11,12	Senior Clerical Manager	At publication and then quarterly
(u)	Issue such forms, take part in such initiatives etc as appropriate / resources allow.	3,6,7,9,10,11,12	All staff	As required
(v)	Receive and process applications for anonymous registrations in accordance with legislation and staff guidance notes.	3,6,7,9,10,11,12	Senior Clerical Manager	Continuous

3.3.3 Elections/Electoral Events – For each Election, individual timetables will be agreed with ROs and other interested parties. Regard will be had to directions and advice from Electoral Management Board and Electoral Commission.

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	In the event of an election, elections or referenda, produce an Election Register or 'Polling List' and special lists of electors such as Absent Voters (Postal and Proxy Voter) lists, to include Personal identifiers, and issue letters in accordance with statute and by agreement with Returning Officers.	3,7,9,10,11,12	ERO/ Assistant ERO/ Senior Clerical Manager	As per election timetable
(b)	Liaise with Returning Officers regarding Polling Places/Schemes and apply changes to EMS where appropriate	7,9,11,12,	Senior Clerical Manager/IT Manager	As required
(c)	Provision of data to allow the printing of Poll Cards etc, including testing of procedures and data exports.	3,7,9,10,11,12	Senior Clerical Manager/ IT Manager	As per election timetable
(d)	Provide split registers suitably marked with Absent Voters to relevant Returning Officers.	3,7,9,10,11,12	Senior Clerical Manager/ IT Manager	As per election timetable
(e)	Supply of election register and absent voters' lists to candidates and election agents in line with the statutory regulations, and to maintain a record of same.	3,7,9,10,11,12	Senior Clerical Manager	As per election timetable
(f)	Check quality of Signature and Date of Birth data for Absent Voters in advance of electoral event	3,7,9,10,11,12	Senior Clerical Manager	As per election timetable
(g)	Provide advice service to Returning Officers staff on day of poll.	7,10,12,13,14	Senior Clerical Manager	Day of Poll
(h)	Receive report of Absent Votes which failed due to PI inconsistencies from ROs – Files automatically loaded into EMS	6,7,9,10,12,13,14	Senior Clerical Manager/ IT Manager	ASAP following electoral event
(i)	Issue relevant letters and/or forms to 'failed 'Absent Voters including reminders	6,7,9,10,12,13,14	Senior Clerical Manager	ASAP following electoral event
(j)	Receive returns from (i) above and process as per normal procedures. If no response – Absent Vote cancellation letter issued	6,7,9,10,12,13,14	Senior Clerical Manager	ASAP following electoral event

3.3.4 Absent Voters – Collection/Refresh of Personal Identifiers for Scottish Elections

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Issue and receive Postal and Proxy voting applications and check for completeness in accordance with VJB guidance notes and integrity checking procedures.	6,7,9,10,11,12,13,14	Senior Clerical Manager	Ongoing
(b)	Scan properly completed returned forms	6, 7,9,10,11,12,13,14	Senior Clerical Manager	Ongoing
(c)	Escalate queries and signature waiver applications in accordance with RVJB guidance notes	6, 7,9,10,11,12,13,14	Senior Clerical Manager	Ongoing
(d)	Confirm acceptability of signature waiver applications by such means as are necessary and process	6, 7,9,10,11,12,13,14	Senior Clerical Manager	Ongoing
(e)	Re-issue forms or make enquiries for incomplete applications	6, 7,9,10,11,12,13,14	Senior Clerical Manager	Ongoing
(f)	Issue confirmations and/or rejection letters as required	6, 7,9,10,11,12,13,14	Senior Clerical Manager	Ongoing
(g)	5-yearly refresh of personal identifiers as required by statute	6, 7,9,10,11,12,13,14	Senior Clerical Manager	Annually
(h)	Provide Electoral Commission with Absent Voter Statistics as requested	7,9,10,11,12,13	Senior Clerical Manager	On request
(i)	Refresh 'failed' AV Personal identifiers as per 3.3.3 (i)-(j) above		Senior Clerical Manager	ASAP following electoral event

3.3.5 Absent Voters – For UK Elections

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Issue and receive Postal and Proxy voting applications and check for completeness in accordance with VJB guidance notes and integrity checking procedures.	6,7,9,10,11,12,13,14	Senior Clerical Manager	Ongoing
(b)	Scan properly completed returned forms into ERO Portal or administer online applications via the ERO Portal	6, 7,9,10,11,12,13,14	Senior Clerical Manager	Ongoing
(c)	Escalate queries and signature waiver applications in accordance with RVJB guidance notes	6, 7,9,10,11,12,13,14	Senior Clerical Manager	Ongoing
(d)	Confirm acceptability of signature waiver applications by such means as are necessary and process	6, 7,9,10,11,12,13,14	Senior Clerical Manager	Ongoing
(e)	Re-issue forms or make enquiries for incomplete applications	6, 7,9,10,11,12,13,14	Senior Clerical Manager	Ongoing
(f)	Issue confirmations and/or rejection letters as required	6, 7,9,10,11,12,13,14	Senior Clerical Manager	Ongoing
(g)	Inform Electors with Avs of the requirement to re apply after 3 years	6, 7,9,10,11,12,13,14	Senior Clerical Manager	Annually from January 2026
(h)	Provide Electoral Commission with Absent Voter Statistics as requested	7,9,10,11,12,13	Senior Clerical Manager	On request
(i)	Refresh 'failed' AV Personal identifiers as per 3.3.3 (i)-(j) above		Senior Clerical Manager	ASAP following electoral event

3.3.6 Anonymous registration

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Investigate and determine anonymous registration applications	3, 6, 7,10,14	Senior Clerical Manager	Ongoing
(b)	Maintain list of valid anonymous registrations	3, 6, 10,	Senior Clerical Manager	Ongoing
(c)	Issue Anonymous Elector Documents to Anonymous electors with elector number	3,7,9,10,12,	Senior Clerical Manager	After publication or monthly update
(d)	Issue reminders before the termination date for anonymously registered electors	6, 7, 10,12,13,14	Senior Clerical Manager	Ongoing

3.3.7 Voter Authority Certificates

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Issue and process applications received for Voter Authority Certificates	3, 6, 7,10,14	Senior Clerical Manager	Ongoing
(b)	Issue and process Temporary Voter Authority Certificates when required by law	3, 6, 7,10, 14	Senior Clerical Manager	Ongoing

3.3.8 Changes in Legislation

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Actively participate in SAA and AEA Committees etc to maintain awareness of likely change	7,8,9,11,13	ERO/Assistant ERO/ Senior Clerical Manager	Ongoing
(b)	Receive all relevant draft legislation and input to all relevant consultations	7,9,11,13	ERO/Assistant ERO/ Senior Clerical Manager	Ongoing
(c)	Implement changes to practices and procedures	3,6,7,9,11,13	Senior Clerical Manager	As required

3.3.9 Boundary Changes

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Provide assistance and advice to Boundary Commission and constituent authorities to inform the re-drafting and legislative processes.	6,7,9,10,12,13	Senior Clerical Manager/ IT manager	As required
(b)	Adjustments to Register to accord with new ward or constituency boundaries as required by any boundary review or voting system.	3,6,7,9,11,13	Senior Clerical Manager/ IT Manager	As required
(c)	Assisting Returning Officers by allocating streets to Polling Districts to be used in the event of an election	3,6,7,9,10,11	Senior Clerical Manager/ IT Manager	As required

3.3.10 ER Data Standards

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Import CAG data from constituent councils to be used within EMS.	7,8,9,10,11,13	Senior Clerical Manager / IT Manager	Ongoing basis
(b)	Cleanse name and address data and attach UPRNs	7,8,9,10,11,13	Senior Clerical Manager / IT Manager	Ongoing basis/as required

3.4 CORPORATE GOVERNANCE

3.4.1 Joint Board Meetings

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Agree timetable for Valuation Joint Board Meetings	7,12,13	Clerk to RVJB	Annually
(b)	Nominate Report authors for VJB Meetings	13	Assessor	As required
(c)	Prepare Board Reports for VJB Meeting	8,12,13,14	Assessor/Treasurer/ Clerk/ Assistant Assessor	Feb/May/Sep/Nov
(d)	Attend Agenda Meetings of VJB	7,8,12	Assessor	Feb/May/Sep/Nov Annually
(e)	Attend meetings of VJB	7,8,12	Management Team	Feb/May/Sep/Nov Annually
(f)	Appoint Office Bearers and Committees as per Standing Orders	12,13	Board members and Clerk to RVJB	Following resignation/ by-election etc

3.4.2 Probity and Propriety

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Liaise with Treasurer to the Valuation Joint Board to review Financial Regulations and present to Board for approval (Revised May 2014)	7,12	Assessor	3-yearly.
(b)	Liaise with Treasurer to the Valuation Joint Board to review Standing Orders and present to Board for approval	7,12	Assessor	3-yearly
(c)	Liaise with Clerk to the Valuation Joint Board Review Schemes of Delegation and present to Board for approval	7,12	Assessor	3-yearly
(d)	Review Codes of Conduct for officers of the Valuation Joint Board	7,12,14	Assessor	Following approval of above
(e)	Prepare and review internal procedural guides to ensure adherence to Schemes of Delegation, Financial Regulations, Standing Orders and Codes of Conduct	7,12,14	Assessor	Following approval of above.

3.4.3 Service Plans

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Prepare and Review 3-year strategic Service Plan	1-6,7,9,11,12,13,14	Assessor	Review annually in April
(b)	Prepare and Review Annual Service Plan	1-6,7,9,11,12,13,14	Assessor	Annually in April

3.4.4 Corporate Governance, Defalcation Procedures and Fraud Prevention

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review Corporate Governance Statement	12	Assessor	Annually
(b)	Review Defalcation procedures	12	Assessor	3-yearly
(c)	Review Fraud Prevention procedures	12	Assessor	3-yearly
(d)	Review and adapt Renfrewshire Policies to meet RVJB requirements	7,8,12,14	Management Team	Ongoing
(e)	Implement and review RVJB Policies and Procedures to meet changes in legislation and good working practices	7,8,9,12,13,14	Management Team	As required

3.4.5 Strategic Management

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Strategy to be developed, implemented and reviewed by Management Team at regular, minuted meetings	1-6,7,9,11,12,13,14	Management Team	4/6 weekly
(b)	Review Vision and Mission statements and strategic objectives	7,9,10,11,12,13,14	Management Team	3-yearly
(c)	Communicate Vision, Mission and strategic objectives to all staff by means of Valuation Forum, Electoral Forum, team briefings and written bullet notes	7,9,10,11,12,13,14	Management Team	Ongoing
(d)	Assess progress in relation to objectives	1-6,7,11,13	Management Team	quarterly
(e)	Provide direction and remit, receive reports and consider outcomes of Valuation Forum, Electoral Forum and ad-hoc working groups	1-6,7,11,13	Management Team	4/6 weekly
(f)	Review progress in relation to Audit Actions, Risk Actions and Annual Service Plan/Forward Planner	1-6,7,11,13	Management Team	Ongoing
(g)	Receive Budget Monitoring Reports and consider any required actions	1-6,7,11,13	Management Team	Monthly

3.4.6 Performance Management, Planning & Reporting

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Consider and agree Performance Management Targets, Planning and Reporting in line with Best Value principles and SAA considerations	1-6,7,10,11,12	Management Team	Annually in April
(b)	Establish annual KPI targets for RVJB	1,2,4,5,7,9,10,11,13	Management Team	Annually in April
(c)	Plan performance to ensure compliance with Best Value and achievement of targets	1-6,11,13	All Managers	Continually
(d)	Continue to develop and review Reporting Framework including the suite of performance reports relevant to key activities	1-6,11,13	Assessor	Continuously reviewed
(e)	Produce RVJB performance reports for consideration by Management Team and submit to Joint Board for noting	7,10,11,12,14	Management Team	Monthly +/or in accordance with Board meetings
(f)	Produce and publish Public Performance Reports	7,10,11,12,14	Assessor /Assistant Assessor	Annually in June
(g)	Present KPI targets to Joint Board for approval	7,11,12	Assistant Assessor	Annually in May
(h)	EC Financial Performance report for submission to EC	7,11,12	ERO/Assistant ERO	July

3.4.7 Internal Working Groups

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Meet to ensure compliance with Health and Safety law and the RVJB Health and Safety Policy	7,8,9,11,13	Health and Safety Working Group?	Quarterly
(b)	Report all Health and Safety matters to Management Team	7,12,13	Health and Safety Committee	Quarterly
(c)	Communicate all Health and Safety issues and actions to staff	13,14	Health and Safety Committee	Quarterly
(d)	Develop, implement and review all processes and procedures in relation to Council Tax and Non-Domestic Rating Valuation	1,2,4,5,7,8,9,10,11,12,13	Valuation Forum	As required
(e)	Develop, implement and review all processes and procedures in relation to Electoral Registration and clerical/administrative support of the valuation functions	1-6,7,8,9,10,11,12,13	Electoral Forum	2 Weekly
(f)	Develop and review all ICT systems and related procedures, including cyber security required activities	1-6,7,8,9,10,11,12,13	Assessor, Assistant Assessor / IT Forum	Monthly
(g)	Develop and Review Data Protection & Freedom of Information procedures.	8,9,10,12	Management Team	Quarterly
(h)	Review membership of working groups	1-6,7,8,11,13	Management Team	As required

3.4.8 Personnel, Policies and Procedures

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review and adapt Renfrewshire Council Policies to meet RVJB requirements as appropriate	7,8,10,14	Management Team	As required
(b)	Consider new/revised Renfrewshire Council Policies and procedures for adoption/adaptation in R VJB	7,8,10,14	Management Team	On receipt
(c)	Provide such training as is required to support Policies	7,8,10,14	Management Team	Before/immediately after approval
(d)	Communicate all approved RVJB Policies and procedures to staff via Team Briefings and written bullet points.	7,8,10,14	Management Team	Immediately following approval
(e)	Make Policies and Procedures available on RVJB DMS & Website	7,8,10,14	Management Team/IT Support Officer	Immediately following approval

3.4.9 Internal and External Audit

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Present Annual Accounts for external audit	12	Treasurer to VJB	Annually in June
(b)	Agree audit plan with External Auditors	11,12,13	Assessor	Annually
(c)	Agree audit plan with Internal Auditors	11,12,13	Assessor	Annually
(d)	Co-operate with internal and external auditors in completion of audit plans	7,11,12,13	Management Team	As per audit plan
(e)	Consider Audit Plans from other VJB's and actions required for RVJB	7,9,11,12	Assessor	As required
(f)	Add agreed audit actions to Collated Audit Actions List and report progress to Management Team	11,12,13	Assessor	As required
(g)	Co-ordinate implementation of actions arising from audit recommendations	9,11,13	Management Team	As required

3.4.10 Risk Management

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review Risk Management Strategy	1-6,9,11,12,13	Assessor /Assistant Assessor	3-yearly
(b)	Implement and review Corporate Risk Register in accordance with the methodology contained in Policy	1-6,9,11,12,13	Management Team	Bi-Annually
(c)	Review Business Continuity/Disaster Recovery Plan	1-6,12,13	Assessor /Assistant Assessor	Annually
(d)	Liaise with RC Legal advisors to review all insurances	1-6,8,11,13	Assessor	Annually

3.5 ACCOUNTABILITY

3.5.1 Annual Accounts

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Process, authorise and pass all Invoices to Creditors and Debtors sections, RC Finance	9,12	Assessor /Assistant Assessor /Service Co-ordinator	Daily*
(b)	Pass Internal Charges to Creditors section, RC Finance	9,12	Assessor /Assistant Assessor/ Service Co-ordinator	As required*
(c)	Pass Accruals Forms to Creditors section, RC Finance	9,12	Assessor /Assistant Assessor/Service Co-ordinator	Annually*
(d)	Pass Manual Journals to Creditors section, RC Finance	9,12	Assessor /Assistant Assessor / Service Co-ordinator	Monthly*
(e)	All Revenue Accounts to be finalised	12	Treasurer/ RC Finance	Annually, June
(f)	Consolidation of Abstract Accounts and completion of Financial Statements for Annual Report	12	Treasurer/ RC Finance	Annually, June
(g)	Annual Report Produced	7,9,10,12,14	Treasurer/RC Finance	Annually in June
(h)	First Public Inspection	12	Treasurer/ RC Finance	Annually, July/August
(i)	Final Audit Reports and Audit Certificates to be received	12	Treasurer/ RC Finance	Annually, September
(j)	Submission of Annual Report and Accounts to Audit Scotland	7,9,10,12,14	Assessor/ERO	Annually
(k)	Final Public Inspection (including advertisement in appropriate local newspapers)	12	Treasurer/ RC Finance and IT	Annually

* Note: These are in accordance with the Renfrewshire Council Closure of Accounts Year End Procedures and Timetables' guidance notes, and may vary from year to year.

3.5.2 External Audit

The timetabling of, and resource allocation to, External Audits are out with the direct control of the Assessor and are subject to annual agreement.

3.5.3 Audit Plan

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Identify priorities for audit including areas of RVJB management concern and internal audit priorities.	1-6,7,10,11,12,13	Assessor	By agreement with Auditors
(b)	Develop and implement an Audit Plan taking account of both internal and external auditors	1-6,7,10,11,12,13	Assessor	By agreement with Auditors
(c)	Co-operate with internal and external auditors in completion of audit plans	7,12	Management Team	As audit plan
(d)	Co-ordinate actions arising from audit recommendations	1-6,7,10,11,12,13,14	Management Team	As required

3.5.4 Performance Monitoring and Reporting

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review suite of performance reports contained in existing Reporting Framework	1-6,7,9,11,13	Assessor	Continually
(b)	Collate established suite of Key Performance Indicators for valuation functions	7,11	Assessor	Annually
(c)	Report above KPIs to Scottish Government (via Scottish Assessors Association)	7,11,12	Assessor	Annually
(d)	Produce and publish Public Performance Reports	7,11,12	Assessor	Annually
(e)	Produce and report annual change in Appeal Statistics (RVAPP) to Scottish Government	7,11,12	Assistant Assessor/ Data Manager	Quarterly
(f)	Collate and submit Electoral Registration statistics (Form RPF 29) to Scotland Office	7,11,12	ERO/IT Manager	Annually, December (or on publication of Register)
(g)	Produce and return COSLA Joint Staffing Watch Survey	7,8,11,12	Assistant Assessor/Service Co-ordinator	Quarterly: April, July, October and January
(h)	Collate and submit suite of KPIs and in-house performance statistics to Management Team	11,12,13	Data Manager	Monthly
(i)	Ad hoc reports	7,11,12,13	Various	As requested.
(j)	Prepare Annual Report for publication and presentation to Joint Board	7,11,12,14	Assessor	Annually in May/June
(k)	Report progress against Collated Audit Action Plan to Management Team	1-6,11,12,13	Assessor	Quarterly
(l)	Preview forthcoming tasks and report progress against Service Plans to Management Team	1-6,11,12,13	Assessor	6-8 weekly
(m)	Complete Electoral Commission performance self-assessment and compile quantitative statistics	3,6,7,9,10,11,12,13	ERO/Senior Clerical Manager	Before/after canvass

Item	Description	Objective(s)	Ownership	Date/Recurrence
(n)	Provide further information and take part in any follow-up verification work undertaken by Electoral Commission	3,6,7,9,10,11,12,13	ERO/ / Senior Clerical Manager	Annually or as required
(o)	Compile Electoral Commission Financial Performance returns	3,6,7,9,10,11,12,13	ERO/Assistant Assessor/	Annually or as requested

3.5.5 Management Team Meetings

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Produce draft minutes of MTMs for consideration by Management Team	8,12,14	Divisional Assessors	ASAP following meetings
(b)	Approve minutes of previous Management Team meetings	8,12,14	Management Team	10 times per annum
(c)	Approved MTM bullets emailed to staff	7,8,9,12,14	Assistant Assessor	ASAP after approval
(d)	Produce draft Working Group minutes for consideration by Group members	8,12,14	Working Group Chairs	ASAP following meetings

3.6 BEST VALUE

3.6.1 Performance Monitoring and Measurement

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	For generalities of suite of performance measurement, including KPIs, see 3.5.4 above.	1-6,7,11,12,13	Various	Various
(b)	Development and review of KPIs, including Electoral Registration Indicators, through SAA Electoral Registration Committee and Electoral Commission	1-6,7,9,11,12,13	ERO/ Assistant Assessor/ Divisional Assessors	Ongoing

3.6.2 Trends and Comparisons

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	General Comparisons with other Assessors and EROs	9,11,12,13	Management Team	Continuous
(b)	Trends updated and comparisons made.	9,11,12,13	Management Team	Immediately following SAA circulation of KPIs
(c)	Internal trends and comparisons	9,11,12,13	Management Team/ Internal Forums	Monthly, in accordance with provision of stats.

3.6.3 Public Performance Reporting

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Compile Public Performance Reports, including Annual Report	7,9,10,11,12,14	Assessor	Annually, after collation of KPIs
(b)	Submit PPRs to Joint Board	7,9,10,11,12,14	Assessor	First meeting after collation
(c)	Publish PPRs to RVJB Web site	7,9,10,11,12,14	Assistant Assessor / IT Support Officer	Annually, after collation of KPIs
(d)	Submit KPIs to Scottish Assessors' Association and through that body to the Scottish Government	7,11,12	Assessor	Annually, as requested
(e)	Provide KPIs and PPRs to staff	7,8,9,10,11,12,14	Assistant Assessor	Monthly
(f)	Review format and content of PPRs	7,9,10,11,12,14	Assessor/ Assistant Assessor	Annually prior to compilation

3.6.4 Stakeholder Consultation

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Develop Public Performance Reports to encourage stakeholder feedback	7,9,10,11,12,14	Assessor/ Assistant Assessor	To concur with publications
(b)	Meet on regular basis with staff representative(s)	7,8	Assessor/ Assistant Assessor	As required
c)	Consider stakeholder requirements received by SAA from Scottish Government, Ratepayers Forum and Scottish Business Rating Surveyors Association	7,9,10,11,12	Management Team	In accordance with each schedule of quarterly meetings
(d)	Consider stakeholder requirements received by SAA Portal from User Group meetings	7,9,10,11,12	Management Team	As received
(e)	Consider stakeholder requirements received directly form SAA Portal	7,9,10,11,12	Management Team	As received
(f)	Further develop Web Site to encourage interaction, particularly in respect of interactive forms	1-6,7,9,10,11,12,14	Assessor/ Management Team/ Senior Clerical Manager/ IT Support Officer	Ongoing

3.6.5 Customer Complaints

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Issue Customer Complaints forms in accordance with reviewed policy	1-6,7,9,10,11,12,13, 14	All staff	As required
(b)	Collate Customer Complaints responses and prepare reports for Management Team	1-6,7,9,10,11,12,13, 14	Assistant Assessor	Quarterly, Annually
(c)	Review Customer Complaints Policy	7,9,11,12,13	Management Team	3 yearly

3.7 EQUAL OPPORTUNITIES

3.7.1 Encouraging Equal Opportunities and Ensuring Compliance

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Provide multi-language assistance on regularly used documents	7,10,11,12	Management Team	As required
(b)	Provide regularly used documents in variable formats	7,10,11,12	Management Team	As required
(c)	Ensure compliance with accessibility requirements for all buildings	7,9,10,11,12,13	Management Team	Continuous
(d)	Consider accessibility in web design	7,9,10,11,12	IT Support Officer	Ongoing
(e)	Attend Community Planning Multi-Agency Equalities Working Group	7,9,10,11,12	Assessor	Per schedule of meetings
(f)	Produce and publish statutory Equality Reports including progress against stated 'outcomes' and in mainstreaming Equality actions.	7,9,10,11,12	Assessor	As required

3.7.2. Policy Review Timetable

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review Combined Equality Scheme	7,8,10,11,12,14	Assistant Assessor	2-yearly
(b)	Review Combined Equality Action Plan	7,8,10,11,12,14	Assistant Assessor	Annually
(c)	Complete Impact Assessments for all policies and procedures	7,8,9,10,11,12	Management Team	As required
(d)	Review Equality Targets/Goals/Outcomes	7,8,9,10,11,12	Management Team	Annually
(e)	Ensure that all Policies are compliant with principles of Equality Act 2010	7,8,9,10,11,12,13,14	Management Team	As implemented or revised
(f)	Ensure that pay grades and scales are compliant with equalities requirements through proper evaluation of all new/amended posts	7,8,10,11,12,14	Management Team	As required

3.7.3 Equalities Reporting

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Maintain Staff Profile to record protected characteristics	8,9,10,12	Assessor	Ongoing
(b)	Implement MTM Equalities Reporting in relation to Recruitment	8,9,10,11,12	Assistant Assessor	As required
(c)	Implement MTM Equalities Reporting in relation to Training, Promotion, Grievances, Disciplinary Action etc.	8,9,10,11,12	Assistant Assessor	Ongoing
(d)	Report/Publish progress against 'stated 'Outcomes' and mainstreaming of equalities actions	8,11	Assessor	Biennial

3.7.4 Promotion and Training

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Train/Brief staff in relation to the Equalities Duties	8,10,11,13,14	Assessor/ Assistant Assessor	Ongoing
(b)	Include aspects of Equality in all Induction Procedures	8,10,11,13,14	Assistant Assessor /All Managers	As required
(c)	Provide Accessibility training to web designers/managers	8,9,10,11,12,14	Assessor	As required
(d)	Review Equalities training requirements at Training Team meetings	8,9,10,11,13	Relevant managers	As required
(e)	Attend relevant Conferences and Learning opportunities	7,8,9,10,11,12,13	All	As required

3.8 STAFFING AND PERSONNEL MATTERS

3.8.1 Development and Review of Personnel Policies

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review existing RC Personnel Policies for adoption and adaptation to VJB's specific requirements.	8,10,11,14	Assessor	Ongoing
(b)	Present suite of Policies to Joint Board for approval	8,10,12	Assessor	As required
(c)	Review all policies	7,8,10,11,14	Management Team	As required
(d)	Review Health and Safety Policy	7,8,10,11,14	H & S Working Group	3 yearly
(e)	Review relevant personnel policies to reflect Equalities requirements (see above)	7, 8,10,11,14	Management Team	As required

3.8.2 Training and Development Policy

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Agree training and development needs of all staff at Training Team meetings	1-6,7,8,10,11,13	Managers / All Staff	Quarterly
(b)	Provide training as identified above, in accordance with the VJB objectives and within budget	1-6,8,10,1113	Assistant Assessor / Training Team	Continually
(c)	Maintain record of training	8,10,13	Assistant Assessor / Training Team	Continually
(d)	Ensure training event appraisals are completed and collated	7,8,11,13	Assistant Assessor / Training Team	Continually
(e)	Revise budget provision for training	7,8,10,11,12,13	Assistant Assessor / Training Team	Annually
(f)	Provide training for trainee/graduate surveyors that meet RICS requirements	1,2,4,5,7,8,10,11,13	Divisional Assessors / Principal Valuers	Continually
(g)	Provide training for staff towards AEA qualifications	3,6, 7,8,10,11,13	ERO	As required
(h)	Provide training in preparation for new tasks, new systems, legislative and operational changes	1-6, 7,8,9,10,11,13	Various	As required
(i)	Provide IT training, including web accessibility training	7,8,9,10,11,13,14	Various	As required
(j)	Provide Equalities training (see 3.7.4(a) above)	7,8,9,10,11,13	Various	As required
(k)	Provide Induction training	7,8,9,10,11,13,14	Various	As required
(l)	Provide Health and Safety training	7,8,9,10,11,13,14	H & S Working Group	As required

3.8.3 Co-operation with Renfrewshire Council

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Regular updates with RC personnel staff to review current issues and policy development	7,8,10	Assessor /Assistant Assessor	As required
(b)	Ad-hoc meetings with RC personnel staff to review current issues and policy development	7,8,10	Assessor / Assistant Assessor	Continual –As required
(c)	Implement information through team briefings and training events	7,8,10,11	Managers	As required

3.8.4 Health and Safety Policy

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review of Health and Safety Policy	7,8,11,13,14	Management Team	Ongoing
(b)	Hold Health and Safety Working Group meetings	7,8,11,13	Chair of Health and Safety Working Group	As required
(c)	Revise Risk Assessments as required	7,8,11,13,14	Health and Safety Working Group	As required
(d)	Approve and Implement revised Risk Assessments	7,8,11,13,14	Management Team	As required

3.9 FINANCE AND BUDGETING

3.9.1 Financial Regulations and Standing Orders

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review Financial Regulations	12,14	Treasurer/Assessor	3-yearly
(b)	Review Standing Orders	12,14	Clerk/Assessor	3-yearly

3.9.2 Budget Preparation

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review probable out-turn along with operational, staffing, training and all other requirements	8,9,11,12,13	Assessor/Assistant Assessor	Annually
(b)	Prepare and agree provisional Revenue Budget Bid with Treasurer	8,9,11,12,13	Assessor	Annually
(c)	Prepare and agree provisional Capital Budget Bid with Treasurer Accountants	8,9,11,12,13	Assessor	Annually if required
(d)	Seek approval for proposed budgets from Valuation Joint Board		Assessor	Annually
(e)	Prepare detailed report on makeup of Revenue Budget	8,9,11,12,13,14	Treasurer	Annually

3.9.3 Financial Procedures

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review procedures for Ordering, Invoicing and Payment, and advice to relevant staff.	8,11,12,13	Service Co-ordinator	Annually
(b)	Review List of Approved Signatories	12	Assessor	Annually or at any change of staff.
(c)	Review database which supports Ordering and Invoicing procedures	7,8,11,12,13	All users/ relevant staff	Continually

3.9.4 Training

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Identify any training requirements arising from 3.9.3 and 3.9.4 at Training Team Meetings	7,8,11,12,13	Relevant managers	Annually
(b)	Identify any training requirements resulting from changes to procedures or personnel	7,8,9,11,12,13	Assistant Assessor	As required
(c)	Provide, arrange or facilitate training and instruction as identified above.	7,8,11,12,13,14	Assistant Assessor	As required

3.9.5 Financial Monitoring Reports

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Receive, check and consider monitoring reports from RC Finance Department	11,12,13	Assessor / Assistant Assessor	Monthly
(b)	Prepare Financial Monitoring Reports, including probable out-turn, reasons for variance, and proposed actions for Management Team	11,12,13	Assessor / Assistant Assessor	Monthly
(c)	Consider and implement any actions required arising from monthly reports	9, 11,12,13	Management Team	Monthly
(d)	Prepare Financial Monitoring Reports, including probable out-turn and reasons for variance, for Valuation Joint Board	11,12,13	Treasurer / Assessor	See VJB meeting schedule

3.9.6 Annual Accounts

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Complete procedures as at 3.5.1 above, and in RC Abstract of Accounts guidance notes	7,11,12,13	Assessor /Assistant Assessor	Annually, April-May
(b)	Liaise with Treasurer/RC Accountants in preparation of Annual Accounts	7,11,12,13	Assessor /Assistant Assessor	Annually, April-June
(c)	Prepare provisional Annual Accounts for year	7,11,12,13	Treasurer	Annually
(d)	Submit Annual Accounts to Audit Scotland	7,11,12,13	Treasurer	Annually
(e)	Include Accounts in Annual Report and present to Valuation Joint Board	7,11,12,13,14	Assessor	Annually
(f)	Consider External Audit Report	7,11,12,13	Treasurer/Assessor	Annually
(g)	Implement any Actions from External Audit of Accounts	7,11,12,13	Treasurer/Assessor	Annually
(h)	Present Final Accounts and External Audit Report, including any Action Plan, to Valuation Joint Board	7,11,12,13	Treasurer/Assessor	Annually

3.9.7 Payroll Checks

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Agree format and procedures for reporting that payroll has been checked against staff lists.	7,11,12,13	Assistant Assessor / Service Co-ordinator	Monthly
(b)	Report any issues to Management Team	7,11,12,13	Assistant Assessor	As required

3.10 INFORMATION TECHNOLOGY

3.10.1 Planning Forum

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Create / Update IT strategy to meet business requirements	7,8,9,10,11,13	Assessor / Senior IT Manager	Monthly
(b)	Meetings to monitor IT projects and timetable	7,8,9,10,11,13	Assessor/Assistant Assessor/ IT Team	Monthly
(c)	Report to management team on progress	7,8,9,10,11,13	Assessor/Senior IT Manager	Continually
(d)	Review training requirements of IT Team in light of any new initiatives	7,8,9,10,11,13	IT Team	Monthly
(e)	Implement an Intranet Strategy	7,8,9,11,13,14	Assessor/Senior IT Manager	Ongoing
(f)	Review schedule of replacement for hardware and software licenses	7,8,9,11,13	Assessor/Assistant Assessor/ IT Team	Ongoing
(g)	Further develop Document Management System to include all policy documents, guidance manuals etc	7,8,9,11,13,14	Assessor/Senior IT Manager	Ongoing
(h)	Ensure all IT systems are functioning as required to meet Stakeholders changing needs	7,9,10,11,12,13	Assessor/ Assistant Assessor	Annually

3.10.2 Business Systems Support

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Liaise with RC appointed Business Manager	7,8,9,11,13	Assessor / Assistant Assessor/ Senior IT Manager	Quarterly or as scheduled
(b)	Liaise with Analyst programmer staff in RC	7,8,9,11,13	Assessor / / Assistant Assessor/ Senior IT Manager	Continually
(c)	Liaise with RC IT Helpdesk	7,8,9,11,13	IT Team	Continually

3.10.3 Asset Refresh

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review PCs and other hardware which is faulty, obsolete, impeding performance or due (in terms of the IT Strategy) for replacement	1-6,11,12,13	Senior IT Manager	Annually
(b)	Investigate options for procurement, costs of replacement etc, via RC Finance & IT	11,12,13	IT Team	Annually
(c)	Consider operational requirements, costs etc and prioritise purchase plan for equipment replacements	1-6,11,12,13	Assessor / Assistant Assessor/ Senior IT Manager	Annually, September
(d)	Complete Capital Budget Bid and Submit to Joint Board at budget planning meeting	1-6,11,12,13	Assessor / Assistant Assessor	As required

3.10.4 Assessors 'Progress' System and associated systems

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Maintain System to receive and utilise outputs from Corporate Address Gazetteers	7,8,9,11,13	IT Team / Data Manager	Liaise with constituent authorities
(b)	Amend System to provide BS7666 compliant outputs to billing systems of constituent Councils	7,8,9,11,13	IT Team /Data Manager	Liaise with constituent authorities
(c)	Amend System to meet agreed business requirements of internal forums & working groups.	1-6,7,8,9,11,13	IT Team / Data Manager	Liaise with constituent authorities
(d)	Monitor and adapt system outputs to enable delivery of agreed data to SAA Portal	7,8,9,11,12,13	IT Working Group	See Portal Project Plans
(e)	Amend System to meet agreed business requirements of stakeholders, including billing departments of constituent councils	1-6,7,8,9,11,13	IT Working Group	By agreement

3.10.5 Satellite Systems

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review use and functionality of Land Register/Sales databases	2,5,7,8,9,11,13	IT Working Group	Annually
(b)	Review use and functionality of Workload Manager database	1,2,4,5,7,8,9,11,13	IT Working Group	Annually
(c)	Review use and functionality of Imperago System	7,8,9,11,13	IT Working Group	Annually
(d)	Review use and functionality of Document Management System	7,8,9,11,13	IT Working Group	Annually
(e)	Review use and functionality of Alpha 5 Valuation and Reporting databases	7,8,9,11,13	IT Working Group	Annually
(f)	Review use and functionality of Training database	7,8,9,11,13	Assistant Assessor	Annually
(g)	Amend guidance to staff on use of satellite systems	7,8,9,13,14	Various	As required

3.10.6 Assessors Portal Project

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Attend Project Management Committee meetings in accordance with requirements of Project Strategy Document	7,8,9,11,12,13	Assessor	Monthly
(b)	Attend Project Team meetings in accordance with requirements of Project Strategy Document	7,8,9,11,12,13	Assessor	Monthly
(d)	Attend Portal Information Management Working Group Meetings	7,8,9,11,12,13	Assessor	Monthly
(e)	Prepare and implement data standards and conventions	7,8,9,11,12	Assessor	As required
(f)	System Upgrades and links with local council gazetteers and relevant business systems	7,8,9,11,12,13	Assessor	As required
(g)	Prepare and implement Business Process Improvements	7,8,9,11,12,13	Assessor	As required
(h)	Provide regular data uploads to Portal	11,12	Data Manager/Senior IT Manager	Weekly
(i)	Refresh Portal Content	7,8,9,11,12,13	Data Manager/ Senior IT Manager	Weekly

3.10.7 Web Site

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review general content and appearance of web site	7,8,9,10,11,12,14	IT Support Officer	Continually
(b)	Refresh to reflect changes to information in the Model Publication Scheme	7,8,9,10,11,12,14	IT Support Officer	As required
(c)	Refresh to reflect changes in policies and procedures	7,8,9,10,11,12,14	IT Support Officer	Annually
(d)	Update Public Performance Report	7,8,9,10,11,12,14	IT Support Officer	Annually in June
(e)	Provide information of elections and provide relevant forms for making applications	3,6,7,8,9,10,11,12,14	IT Support Officer/Senior Clerical Manager	As required

3.11 DATA PROTECTION

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Register with the Information Commissioner as Data Controller for the Assessor, the ERO and the Joint Board	10,12	Assessor/Assistant Assessor	Annually
(b)	Discuss with Data Protection Officer any new process or changes to existing processes to ensure compliance with Data Protection Legislation	7,9,10,13,14	Assistant Assessor	As required
(c)	Review all Data Sharing Agreements with other Data Controllers to ensure continued compliance with Data Protection Legislation and best practice	9,12,13,14	Assessor/Assistant Assessor	As required
(d)	Review Privacy Notices, forms and letters to comply with Data Protection Legislation	7,9,10,14	Assistant Assessor	As required
(e)	Review Data Processor Agreement with other data processors to ensure compliance with Data Protection Legislation and best practice	9,12,13,14	Assessor/Assistant Assessor	As required

3.12 FREEDOM OF INFORMATION

3.12.1 Freedom of Information Policy

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review Freedom of Information Policy	7,9,10,11,12,13,14	Management Team	Annually
(b)	Review workloads created by FOI and procedures contained in Policy	7,8,9,11,13	Management Team	Ongoing

3.12.2 Freedom of Information functionality

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review functionality of Freedom of Information logging system	7,8,9,11,12,13	Assistant Assessor	Annually
(b)	Prepare reports on requests, refusals etc to Management Team	7,9,11,12,13	Assistant Assessor	Monthly-as required

3.12.3 Publication Scheme and Guide to Information

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review Model Publication Scheme, including various costs, and Guide to Information.	7,9,10,11,12,13,14	Assistant Assessor	As required
(b)	Review content of publications contained in Publication Schemes	7,9,10,11,12,13,14	Assistant Assessor	At least annually

3.12.4 Freedom of Information Procedures

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review Information Audit	7,9,10,11,12,13	Assistant Assessor	Annually
(b)	Review Guidance to Staff on exempt categories	7,8,9,10,11,12,13,14	Assistant Assessor	Annually or in light of cases.
(c)	Receive and reply to requests with guidance from RC where required	7,10,11,12,13,14	Assistant Assessor	Continually
(d)	Receive and reply to requests for Review of decisions	7,10,11,12,13,14	Information Governance Solicitor	As required
(e)	Report FOI requests, refusals, referrals etc to Management Team	7,9,11,13	Assistant Assessor	Monthly-as required
(f)	Review system used to log and report on FoI	7,8,9,11,12,13	Assistant Assessor/IT Team	Annually

3.12.5 Codes of Practice

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review Codes of Practice issued in respect of FOI	7,9,10,11,12,13,14	Assistant Assessor	On receipt
(b)	Implement requirements of Codes of Practice	7,8,9,10,11,12,13	Assistant Assessor	As required
(c)	Consider IC decisions and reports for changes to policy and procedures	7,8,9,10,11,12	Assessor / Assistant Assessor	As required

3.13 KEY PARTNERSHIPS

3.13.1 Support Services – Renfrewshire Council

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Liaise with representatives from RC HR & OD Service/Business Partner	7,8,11	Assessor/Assistant Assessor/ Divisional Assessors	As required
(b)	Ad-hoc meetings with representatives from RC HR & OD Service	7,8,11	Assessor/Assistant Assessor /Divisional Assessors	As required
(c)	Regular 'ICT Liaison' Meetings with RC ICT Business Liaison Officer	7,8,9,11,13	Assessor/Assistant Assessor	Quarterly or as scheduled
(d)	Ad-hoc meetings, telephone contact with ICT Section Heads and other RC ICT personnel.	7,8,9,11,13	Senior IT Manager	As required
(e)	Meetings and liaison with RC Internal Audit section	7,9,11,12,13	Assessor / Assistant Assessor	As agreed
(f)	Liaison with RC Accountants	7,9,11,12,13	Assessor / Assistant Assessor	Monthly
(g)	Liaison with Treasurer to the Board	7,9,11,12,13	Assessor/Assistant Assessor	As required
(h)	Budget planning meetings with Treasurer/Accountants	7,9,11,12,13	Assessor	Annually, September – November
(i)	Liaison with Clerk to the Board	7,11,12,13	Assessor	As required
(k)	Meet with RC Property Maintenance Managers	7,11,13	Assessor/Assistant Assessor/ Service Co-ordinator	As required

3.13.2 Constituent Councils - Recipients of Operational Outputs

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Liaison with Finance (Billing) Departments of constituent Councils	1,2,4,5,7,9,10,11,13	Divisional Assessors	At updates and as required
(b)	Liaison with Finance (Billing) Departments of constituent Councils	1,2,4,5,7,9,10,11,13	All staff	Throughout year daily basis
(c)	Liaison with Returning Officers of constituent Councils	3,6, 7,9,10,11,13	ERO / Assistant Assessor/Senior Clerical Manager	As required
(d)	Attend Election Management meetings with RO of relevant Councils	3,6, 7,9,10,11,13	ERO/Assistant Assessor/Senior Clerical Manager	Prior to Elections

Item	Description	Objective(s)	Ownership	Date/Recurrence
(e)	Liaise with constituent Councils to promote Electoral Participation	3,6, 7,9,10,11,13	ERO/Assistant Assessor/Senior Clerical Manager	Ongoing

3.13.3 Scottish Assessors Association

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Attend Plenary Meetings	1-6,7,8,9,11,13	All members	Quarterly; Dec, Feb, May, Sept
(b)	Attend Assessors Committee Meetings	1-6,7,8,9,11,13	Assessor	Approx. monthly
(c)	Attend Category Committee Meetings	1-6,7,8,9,11,13	Relevant members	In accordance with Committee Timetables
(d)	Attend Other Committee Meetings	1-6,7,8,9,11,13	Relevant members	In accordance with Committee Timetables
(e)	Attend Working Group Meetings	1-6,7,8,9,11,13	Relevant members	In accordance with relevant Timetable
(f)	Attend SAA Portal Project Management Committee	7,8,9,11,13	Assessor	Monthly
(g)	Attend SAA Portal Project Team Meetings	7,8,9,11,13	Assessor/Relevant Members	Monthly
(h)	Attend SAA Portal Working Group Meetings	7,8,9,11,13	Assessor/Relevant Members	Monthly
(i)	Attend Ad-hoc Meetings and Representations	1-6,7,8,9,11,13	Relevant members	As required
(j)	Provide colleagues with update (bullet form) of all Committee and Working Group meetings	1-6,7,8,9,11,13	Relevant members	Immediately following meetings
(k)	Provide information to working groups etc	1-6,7,8,9,11,13	All members	As required
(l)	Review and comment on Practice Notes, Consultation responses etc	1-6,7,8,9,11,13	All members	As required

3.13.4 Scottish Assessors Association Partners

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)*	Harmonisation Meetings with VOA, NI Valuation and Land Agency and Eire Valuation Office	1-6,7,8,9,11,13	SAA (Assessor)	Twice-yearly, (Annually)
(b)	Liaison with VOA	1-6,7,8,9,11,13	SAA Harmonisation Spokespersons and Category Committee Chairmen	As required
(c)	Receipt and circulation of Minutes of VOA Rating Group Leaders Meetings	1-6,7,8,9,11,13	Assessor	Monthly
(d)*	Formal Meetings with Scottish Government Departments	1-6,7,9,11,12,13	SAA	Quarterly
(e)	General liaison with Scottish Government Departments	1-6,7,9,11,12,13	SAA	As required
(f)	General liaison and working group involvement with Scotland Office	3,6,7,9,11,12,13	SAA	As required
(g)*	General liaison and working group involvement with Department of Levelling Up Communities and Housing	3,6,7,9,11,12,13	SAA	As required
(h)	Provision of statistical returns to Scottish Government	1-6,7,8,9,11,12,13	Assistant Assessor/ Data Manager	Quarterly
(i)	Completion of statistical exercises for Scottish Government and their partners	1-6,7,8,9,11,12,13	All staff	As required
(j)*	Meetings of Ratepayers Forum	1,4,7,10,11,12	SAA	Approx. quarterly
(k)*	Meetings with Scottish Ratepayers Forum, Scottish Rating Surveyors Forum and Scottish Business Ratepayers Group	1,4,7,10,11,12	SAA	Approx. quarterly
(l)	Meetings of Portal Users Groups (Including Police and Fire Services, Registers of Scotland, Ordnance Survey, Scottish Executive, Local Authorities, NHS, Ratepayers Agents etc)	7,10,11,12	Portal Project Management Committee	As required
(m)	Liaison with Scottish Government, Scotland Office, Electoral Commission and Boundary Commission officials on electoral and related matters	3,6,7,8,9,11,12,13	ERO / Assistant Assessor/ Senior Clerical Manager	As required

Note items marked* will be attended by Assessor

3.13.5 Association of Electoral Administrators

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	AEA AGM and Conference	3,6,7,8,9,11,13	Rota	Annually
(b)	Plenary Meetings of Scottish Branch of AEA	3,6,7,8,9,11,13	ERO/Assistant ERO/Senior Clerical Manager	Quarterly
(c)	Other meetings of Scottish Branch of AEA	3,6,7,8,9,11,13	ERO/Assistant ERO/Senior Clerical Manager	As required

3.13.6 The Electoral Commission

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Receipt of Electoral Commission Bulletins	3,6,7,9,11,13	ERO/Assistant ERO/Senior Clerical Manager	Regularly
(b)	Receipt of Electoral Commission Reports, Guidance and Consultations	3,6,7,9,11,13	ERO/Assistant ERO/Senior Clerical Manager	Regularly
(c)	Attend Electoral Commission meetings, seminars and Working Groups	3,6,7,9,11,13	ERO/Assistant ERO/Senior Clerical Manager	As required
(d)	Respond to Electoral Commission Consultations (possibly through SAA ER Committee)	3,6,7,9,11,13	ERO/Assistant ERO/Senior Clerical Manager	Ad hoc

3.13.7 External Suppliers

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Liaison with canvass form printing and mailing contractor	3,7,9,10,11,13,14	Assistant ERO/Senior Clerical Manager	As required
(b)	Invite Tender Bids for printing of canvass stationery, printing and mailing	3,10,11,12,13	Assistant ERO	As per agreed contract
(c)	Meetings/Liaison with I Mail Services	3,6,7,10,11,13	Assistant Assessor/Senior Clerical Manager	As required
(d)	Meetings/Liaison with suppliers of fixtures and fittings, including photocopier, water supplies etc	7,11,13	Assistant Assessor	As required
(e)	Liaise with Laserfiche Account Manager	3,6,7,8,9,10,11,13	Assistant Assessor/ Senior IT Manager	Ongoing/As Required
(f)	Liaise with Democracy Counts Account Manager	3,7,9,10,11,12,13,14	Assistant EROs/Senior Clerical Manager/ IT Manager	Ongoing/As Required

3.14 RECORDS MANAGEMENT

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Submit Records Management Plan to National Registers of Scotland	1-6,7,8,9,11,12,13,14	Assistant Assessor	When requested by the Keeper
(b)	Implement Improvement Plan	1-6,7,8,9,11,12,13,14	Assistant Assessor	Ongoing
(c)	Staff Training for above	1-6,7,8,9,11,13,14	Assistant Assessor	Ongoing
(d)	Consider submitting Progress Update Review	1-6,7,8,9,11,12,13,14	Assistant Assessor	Annually on request

3.15 MISCELLANEOUS

3.15.1 Consultations

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Electoral Commission consultations	7,12,13	Assessor in consultation with SAA & constituent Councils	As they arise
(b)	Review of Local Government Finance	7,12,13	Assessor in consultation with SAA & constituent Councils	As they arise
(c)	Scottish Government	7,12,13	Assessor in consultation with SAA & constituent Councils	As they arise
(d)	Department of Levelling Up, Housing and Communities & Scotland Office	7,12,13	Assessor in consultation with SAA & constituent Councils	As they arise

3.15.2 Local Authority and Electoral Boundary Changes

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Input to and respond to future changes, drafts etc	7,12,13	Assessor & ERO	As required

3.15.3 Corporate Address Gazetteers

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Attend and participate in Corporate Address Gazetteer Team Meetings	7,8,9,11,13	IT Manager	As required
(b)	Continue to maintain data, cleanse and match data, to receive and utilise outputs from Corporate Address Gazetteers/One Scotland Gazetteer	7,8,9,11,13	IT Manager	Weekly
(c)	Continually review Business Processes to facilitate use of CAG data and contribute to the maintenance procedures of CAGs	8,9,11,13	Management Team	To align with CAG implementation

3.15.4 Office Accommodation

Item	Description	Objective(s)	Ownership	Date/Recurrence
(a)	Review current and future accommodation requirements	1,2,3,4,5,6,7,8,9,10,11,12,13	Management Team	Ongoing
(b)	Identify suitable alternative accommodation	1,2,3,4,5,6,7,8,9,10,11,12,13	Management Team	Ongoing
(c)	Prepare for and implement move with minimal service disruption	1,2,3,4,5,6,7,8,9,10,11,12,13	All Staff	By March 2025

RENFREWSHIRE VALUATION JOINT BOARD

ASSESSOR AND ELECTORAL REGISTRATION OFFICER
SERVICE PLAN APRIL 2024 - APRIL 2027

PART FOUR
PERFORMANCE MANAGEMENT

The following section sets out the statutory framework governing the core duties, services and areas of activity of the Valuation Joint Board, along with the approach to performance planning, establishment of standard, target setting, performance monitoring and performance reporting related to these tasks.

1.1 THE VALUATION ROLL

CORE OBJECTIVE REFERENCE	CORE OBJECTIVE DESCRIPTION	PLANNING (Including statutory timetables etc)	STANDARDS AND TARGETS	MONITORING (Nos. in brackets refer to Reporting Framework)	REPORTING
1.1.1	Maintenance of the Valuation Roll	Section 2(2), Local Government (Scotland) Act 1975.	Changes generally must be effected in same financial year.	Divisional Assessors check and authorise. See KPIs below.	Monthly stats provided to staff.

KPIs reported to Scottish Executive and included in Board, Annual and Public Performance Reports |
| | | Valuation roll update schedule agreed at start of each year. | Weekly Updates | Divisional Assessors | |
| | | KPI targets agreed by MT at start of each year. | Ratio of changes made within 3, 6 and 9 months each year. | Monthly reports of progress re surveys and changes to Val Roll provided to Management Team. | |
| 1.1.2 | Preparations for Revaluation | Section 1 Local Government (Scotland) Act 1975. | Statutory requirement to provide values to local authorities on 15th March 2026 | Weekly progress reports to MT once Reval project has commenced | Updates on progress provided to SAA and Scottish Government as required.

Increase or adjustment factors use as checks on values. |
		Scottish Government requirement for 'final estimates'	Commitment to provide values to Scottish Government at a time to be agreed		
		SAA schedules for PN production	Provide context for the planning and application of resources for v Valuation Notices to be issued circa March 2026		
1.1.3	Running Roll Appeals	As 1.1.2 above	Appeals to be disposed of in line with Valuation Timetable Order	As1.1.2 above	As 1.1.2 above
1.1.4	Disposal of Telecoms Appeals	As 1.1.2 and 1.1.3 above			

1.2 THE (COUNCIL TAX) VALUATION LIST

CORE OBJECTIVE REFERENCE	CORE OBJECTIVE DESCRIPTION	PLANNING (Including statutory timetables etc)	STANDARDS AND TARGETS	MONITORING (Nos. in brackets refer to Reporting Framework)	REPORTING
1.2.1	Maintenance of the Valuation List	Section 84 of Local Government Finance Act.	No set timetable/ requirement		Monthly stats provided to staff.
		Valuation List update schedule agreed at start of each year.	Weekly Updates	Divisional Assessors	
		KPI targets agreed by MT at start of each year.	Ratio of additions made within 3, 6 and 9 months each year.	Monthly reports of progress re surveys and additions to Val List provided to Management Team.	KPIs reported to Scottish Government and included in Board, Annual and Public Performance Reports
1.2.3	Disposal of Council Tax Proposals/Appeals	The Council Tax (Alterations of Lists and Appeals) (Scotland) Regulations 1993	Legislative requirement to respond to proposal within 6 months.	Monthly reports on appeals progress provided to Management Team	Monthly reports to Management Team

1.3 REGISTER OF ELECTORS

CORE OBJECTIVE REFERENCE	CORE OBJECTIVE DESCRIPTION	PLANNING (Including statutory timetables etc)	STANDARDS AND TARGETS	MONITORING (Nos. in brackets refer to Reporting Framework)	REPORTING
1.3.1	Compilation of Register of Electors	Representation of the People Act 2000	Registers to be published annually, prior to 1st December.	Canvass Progress Stats provided to Senior Managers weekly during canvass period	Canvass return rate reported to Scottish Assessors Association and Electoral Commission Performance Standards statistics submission
		Section 10 of Representation of the People Act 1983	Carry out an annual canvass (to allow publication of above). Aim for maximum return possible of Canvass communications (where required) and ITR forms		
		Schedule of canvass forms issue and reminder dates agreed in advance.			
		System of canvass return by telephone, internet or SMS established annually		System providers supply rates of return weekly.	These returns are shown separately in stats shared with SAA.
1.3.2	Maintenance of Register of Electors	The Representation of the People Regulations 2001	Monthly updates to be made to registers.	Update Statistics - presented to Management Team monthly.,	Monthly changes included in Board and Annual Reports. Electoral Commission Performance Standards statistics submission
		Regulations set out a timetable to be followed each year. Amended for working days and local holiday variations etc at start of each year.			